Historic, archived document

Do not assume content reflects current scientific knowledge, policies, or practices.

Foreign Crops and MARKETS

VOLUME 51 NUMBER 11

SEPTEMBER 10, 1945

LIBRARY
CURRENT SERIAL RECORD
☆ SEP 17 1945 ☆
U. S. DEPARTMENT OF AGRICULTURE

IN THIS ISSUE

Page

GRAINS, GRAIN PRODUCTS, AND FEEDS
World Wheat and Rye Crops Reduced 127
War Reduces Philippine Islands Rice Acreage 132
Cuban Government Regulates Rice Distribution 133
Nicaraguan Rice Crop Prospects Favorable 133

TOBACCO
Ceylon Imports More Foreign Tobacco .. 133
Greece Removes Tobacco Controls 134

COTTON AND OTHER FIBERS
Belgian Fiber Production Increases ... 134
Weekly Cotton Prices on Foreign Markets 135

FRUITS, VEGETABLES, AND NUTS
San Jose Scale Reported in France 136
Canadian Forage Seed Prospects Vary .. 136
Canary Islands Tomato Outlook Promising 137

LIVESTOCK AND ANIMAL PRODUCTS
Britain Forms Joint Organization to Market Wartime Wool Surplus 138
Danish-Polish Trade Agreement Includes Livestock and Animal Products 138

MISCELLANEOUS
Late News 126

Issued by the OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

LATE NEWS

Danish food exports for the last half of 1945 are now expected to reach 55,000 tons (short) of pork, 33,000 short tons of butter, 1,100 tons of eggs, and 7,700 tons of sugar. Denmark also currently has a beef cattle surplus above domestic requirements of 200,000 head, the equivalent of about 55,000 tons of beef. Export slaughter capacity is sufficient for the production of 18,000 tons by the end of the year.

Assuming that present feed supplies and export prices will continue, Danish exports for the year 1946 are expected to total 110,000 tons (short) of pork, 55,000 tons of butter, 3,300 tons of eggs, and 25,400 tons of sugar. These tonnages would represent about one-third of prewar export levels in the case of pork, one-fourth for butter, and less than 3 percent for eggs. Before the war, Denmark was not on an export basis for sugar.

Argentina's third official estimate for the 1944-45 sunflower-seed crop is 2,172 million pounds, compared with the corresponding one of 2,284 million last year. The sunflower seed market has been very active; on August 22, 1945, the spot price was 19.20 pesos per 100 kilograms (2.59 cents per pound), and October futures were 19.33 pesos (2.61 cents).

The latest estimate of the 1945 wheat production in India places the crop at 388,453,000 bushels, compared with 368,965,000 bushels, the corresponding estimate for a year ago, and the final 1944 estimate of 411,858,000 bushels. The current figure is about 4 million bushels less than the previous estimate. The revised acreage estimate is placed at 35,410,000 acres, compared with 33,775,000 last year.

Argentina's third official estimate of the 1944-45 corn production places the outturn at 116,745,000 bushels. This is a reduction of approximately 4 million bushels from the previous estimate, making the 1945 crop only about 34 percent of last year's harvest. While the planted acreage was about 9 percent less than for the preceding crop, the harvested acreage is estimated at only about 58 percent of the 1943-44 harvested area, as a result of drought damage.

Crops throughout Cuba are now growing satisfactorily although very much retarded as a result of last spring's drought. In some areas, inadequate rains did not commence until August. Most food crops, therefore, are not yet ready for harvesting.

Crop prospects in Finland as of August 15 were reported by the Finnish press on August 30 as being about normal. The hay crop was said to be smaller but the potato crop larger than that of 1944. The fall wheat crop was referred to as the best cereal crop.

WORLD WHEAT AND RYE CROPS REDUCED

The 1945-46 world production of wheat is estimated to be about 5,400 million bushels, a decline of 5 percent from 1944 and 8 percent less than the 1935-1939 average. The rye crop of about 1,400 million bushels is 8 percent less than a year ago and is 16 percent smaller than the prewar average. As a result of the reduced harvests, particularly in Europe and North Africa, a sharp increase in the international trade in wheat can be expected in 1945-46 when compared with recent war years; trade in rye probably would also show a significant gain were adequate supplies available for export.

The situation by countries and continents is far from uniform. The United States is harvesting a record crop of wheat with a gain of around 70 million bushels over last year's record outturn. Nevertheless the North American total is expected to be slightly smaller than a year ago due to an estimated decline of approximately 100 million bushels in Canada. (The first official estimate for Canada and the September estimate for the United States will be released on September 10.) Similarly the United States rye crop shows a small gain over last year, while the prospective Canadian crop, and in turn the North American total, is smaller.

While Europe has harvested below-average crops of wheat and rye during all of the war years, production has been maintained at a fairly high level with some countries, particularly deficit areas such as the United Kingdom, Eire, and Switzerland, showing significant gains. The prospective 1945 breadgrain outturns, however, reveal a sharp decline from a year ago, and for most countries the harvest is not only the poorest of the entire war period but the smallest since the early 1920's. A number of factors have combined to reduce the 1945 wheat crop--a rainy fall along with war operations curtailed seeding activities in many areas; a severe spring drought in most of the Mediterranean area reduced yields, notably in North Africa, Spain, Italy, and parts of the Balkans; fertilizer availability reached the lowest level of the war with current and cumulative effects upon yields; and land reform, population shifts and the requisitioning of livestock, especially draft power, extensively and suddenly carried out, took a heavy toll in eastern and central European production.

Preliminary reports from Hungary, for example, which was an important surplus area before and during the war, indicate a crop of only around 27 million bushels as against a prewar average of 91 million bushels. Other Danube countries report around half, or less, of a prewar crop. The large estate area of eastern Germany, which formerly produced surpluses for the industrial and deficit areas of the West and South, appears to have lost much of the current harvest even on acreages planted.

Wheat: Acreage, yield per acre and production in specified countries, year of harvest, averages 1930-34 and 1935-39, annual 1943-1945 a/

Continent and country	Acreage b/					Yield per acre		Production				
	Average		1943	1944	1945 prelim.	Average		Average		1943	1944	1945 prelim.
	1930-34	1935-39				1930-34	1935-39	1930-34	1935-39			
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bu-shels	Bu-shels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America:												
United States	54,193	57,293	50,648	59,309	64,961	13.5	13.2	732,527	758,623	841,023	1,078,647	1,146,000
Canada	25,682	25,595	16,850	23,284	(23,425)	13.6	12.2	348,560	312,399	284,460	435,535	(335,000)
Mexico	1,237	1,244	1,259	1,362	1,231	11.6	11.5	14,364	14,282	13,385	14,568	14,168
Estimated total	81,150	84,150	68,820	84,000	89,700	-	-	1,096,000	1,086,000	1,140,000	1,530,000	1,496,000
Europe:												
United Kingdom	1,522	1,843	3,461	3,220	2,355	33.6	33.8	51,176	62,361	129,680	117,200	(80,000)
Eire	43	225	509	642	(650)	39.5	34.2	1,698	7,689	16,255	20,388	(21,000)
Spain	11,236	10,220	8,710	(8,896)	-	14.1	11.1	158,081	113,905	85,336	102,239	(73,000)
Portugal	1,321	1,227	1,349	-	(1,370)	14.0	13.1	18,359	16,066	10,848	(12,309)	(11,000)
Switzerland	145	181	248	243	-	31.2	33.0	4,519	5,971	(8,000)	9,793	-
Greece	1,612	2,150	-	-	-	11.4	14.0	18,414	30,205	-	-	-
Italy	12,089	12,635	13,234	11,853	11,116	20.9	22.1	252,604	279,519	239,549	236,485	153,900
Germany	5,310	5,074	-	-	-	32.1	34.8	170,212	176,654	-	-	-
Austria	535	616	-	-	-	23.6	24.5	12,626	15,117	-	-	-
Czechoslovakia	2,129	2,220	-	-	-	25.2	26.6	53,697	59,090	-	-	-
Poland	4,280	4,303	-	-	-	17.4	18.0	74,267	77,245	-	-	-
France	13,280	12,724	c/10,736	c/10,378	c/ 9,390	23.0	23.0	305,318	292,568	c/ 242,506	c/ 256,285	c/ 206,681
Belgium	384	402	501	489	413	38.3	40.2	14,726	16,150	19,631	19,900	-
Luxembourg	31	47	40	-	-	24.1	25.8	747	1,214	1,082	-	-
Denmark	259	316	121	210	215	43.0	45.4	11,131	14,358	6,614	10,141	9,994
Netherlands	267	338	368	(375)	(272)	44.2	45.0	11,802	15,209	12,527	(13,044)	-
Norway	32	80	(117)	(116)	(119)	25.1	29.9	804	2,391	(2,700)	(2,500)	-
Sweden	697	740	658	682	749	33.3	35.6	23,214	26,351	19,350	19,941	23,552
Finland	71	264	288	313	-	25.9	26.6	1,842	7,013	5,806	5,843	-
Lithuania	484	512	-	-	-	18.8	17.6	9,106	9,013	-	-	-
Latvia	262	346	-	-	-	21.0	19.0	5,504	6,584	-	-	-
Estonia	127	168	-	-	-	17.3	16.4	2,203	2,752	-	-	-
Bulgaria	3,078	3,080	-	-	-	17.2	20.9	52,864	64,228	-	-	-
Hungary	3,943	4,091	-	-	-	19.4	22.3	76,506	91,210	-	-	-
Rumania	7,703	9,053	-	-	-	13.4	15.6	103,447	140,816	-	-	-
Yugoslavia	5,098	5,349	-	-	-	15.6	18.1	79,494	96,750	-	-	-
Albania	85	99	-	-	-	(18.7)	(15.2)	1,588	1,507	(1,655)	(1,655)	(1,500)
Estimated total	76,033	78,313	74,000	70,000	62,000	-	-	1,516,000	1,632,000	1,500,000	1,465,000	1,100,000
Soviet Union	85,798	98,764	-	-	-	10.0	10.6	860,448	d/1,050,000	-	-	-
Africa:												
Algeria	3,893	4,184	3,849	3,496	3,170	8.4	8.4	32,571	35,201	28,660	26,455	11,023
French Morocco	2,887	3,254	3,518	2,891	2,326	10.2	7.1	29,509	23,198	24,504	17,821	6,614
Egypt	1,560	1,464	1,990	1,714	1,710	27.6	31.3	43,128	45,848	47,460	34,761	44,092
Tunisia	1,995	1,901	1,557	1,606	1,962	6.5	7.9	12,956	14,965	7,423	6,908	6,357
Union of South Africa	1,516	1,926	2,710	2,345	(2,400)	8.1	8.4	12,301	16,259	17,689	14,000	(15,000)
Estimated total	12,630	13,720	14,800	13,300	12,800	-	-	135,000	142,000	134,000	108,000	90,000

Asia:												
China	49,106	48,120	-	-	-	16.7	14.9	820,624	715,536	-	-	-
Manchuria	3,301	2,903	-	-	-	12.4	12.1	40,770	35,200	-	-	-
Japan	1,356	1,738	-	-	-	27.1	28.8	36,806	50,133	40,294	-	-
Chosen	809	832	-	-	-	11.2	12.3	9,048	10,240	-	-	-
India	33,340	34,492	34,417	33,740	35,072	10.7	10.7	355,593	370,660	411,858	361,757	392,037
Palestine	475	533	406	340	(350)	5.3	6.1	2,538	3,244	2,426	2,111	(2,800)
Syria and Lebanon	1,245	1,363	1,606	(2,090)	(2,100)	11.8	14.3	14,638	19,485	21,432	20,824	(21,000)
Turkey	7,023	8,952	8,654	9,243	(10,600)	13.5	15.2	94,796	135,690	146,973	115,683	(85,000)
Iran	(3,163)	(4,191)	3,706	3,212	-	(18.5)	(17.2)	(58,475)	(72,128)	60,626	76,426	(80,000)
Iraq	(1,595)	(1,747)	1,286	2,162	(2,200)	(8.2)	10.4	(13,090)	18,114	13,962	12,860	(13,000)
Estimated total	102,300	105,900	105,000	107,000	110,000	-	-	1,456,000	1,442,000	1,490,000	1,530,000	1,480,000
South America:												
Argentina	17,709	15,834	14,799	11,064	(14,500)	13.8	14.0	243,932	221,769	249,855	150,108	(225,000)
Chile	1,763	1,963	1,953	1,989	-	15.5	16.1	27,355	31,562	35,943	33,684	-
Uruguay	1,055	1,210	819	856	-	9.4	11.0	9,876	13,256	11,046	6,494	-
Brazil	391	443	-	-	-	14.1	10.5	5,530	4,657	-	-	-
Peru	298	285	263	-	-	10.4	11.5	3,112	3,274	3,317	3,490	-
Estimated total	21,800	20,500	19,100	15,300	18,700	-	-	295,000	280,000	310,000	205,000	280,000
Oceania:												
Australia	15,223	13,128	7,875	8,074	(11,500)	12.2	12.9	185,773	169,744	109,724	53,000	(135,000)
New Zealand	266	221	234	187	(200)	30.2	32.3	8,037	7,129	7,208	6,500	(7,000)
Total	15,489	13,349	8,109	8,261	11,700	-	-	193,810	176,873	116,932	59,500	142,000
Est. world total	395,213	414,703	365,000	373,000	387,000	-	-	5,553,000	5,810,000	5,400,000	5,650,000	5,400,000

Compiled from official sources and International Institute of Agriculture, where available; otherwise Office of Foreign Agricultural Relations estimates (shown in parentheses) based on foreign service reports and other information.

a/ Harvests of the Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow; thus, the crop harvested in the Northern Hemisphere in 1944 is combined with the Southern Hemisphere harvest which began late in 1944 and ended early in 1945.

b/ Figures refer to harvested areas as far as possible.

c/ Official estimates adjusted to include Alsace Lorraine.

d/ Official estimates adjusted to take account of harvest losses.

Rye: Acreage, yield per acre and production in specified countries, year of harvest, averages 1930-34 and 1935-39, annual 1943-1945 a/

Continent and country	Acreage b/ Average 1930-34	Acreage b/ Average 1935-39	Acreage b/ 1943	Acreage b/ 1944	Acreage b/ 1945 prelim.	Yield per acre Average 1930-34	Yield per acre Average 1935-39	Production Average 1930-34	Production Average 1935-39	Production 1943	Production 1944	Production 1945 prelim.
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America:												
United States	2,896	3,699	2,755	2,254	2,096	10.6	12.1	30,823	44,917	30,452	25,872	27,883
Canada	858	816	576	648	(500)	10.4	11.3	8,939	9,191	7,143	8,526	(5,000)
Total	3,754	4,515	3,331	2,902	2,596	-	-	39,762	54,108	37,595	34,398	32,883
Europe:												
Spain	1,494	1,396	1,547	(1,544)	(1,[illegible])	14.8	12.8	22,164	17,801	15,002	16,779	(14,800)
Portugal	392	342	418	[illegible]	(420)	12.1	11.8	4,746	4,035	3,897	4,330	(4,700)
Switzerland	44	38	39	36	-	32.2	33.4	1,417	1,269	(1,200)	(1,566)	-
Italy	300	262	251	(247)	(222)	20.9	21.8	6,256	5,701	4,956	(5,000)	3,401
France	1,752	1,620 c/	1,075 c/	1,013 c/	939	18.3	18.3	32,021	29,643 c/	15,353 c/	14,763 c/	14,960
Belgium	563	369	391	348	284	38.8	38.8	21,461	14,319	13,063	12,826	(9,000)
Luxembourg	20	18	22	16	(15)	24.4	25.7	487	462	547	358	(300)
Denmark	346	352	554	482	393	27.7	28.4	9,573	9,983	19,963	16,534	12,007
Netherlands	440	559	784	-	667	35.5	36.4	15,662	20,331	23,936	-	(12,755)
Norway	16	13	-	-	-	28.6	31.2	458	405	-	-	-
Sweden	555	495	543	502	448	30.2	30.0	16,786	14,828	15,934	14,046	12,676
Finland	553	578	389	397	-	24.9	24.0	13,767	13,883	7,302	6,535	(6,500)
Germany	11,140	10,930	-	-	-	27.6	27.9	307,522	304,906	-	-	-
Austria	944	901	-	-	-	24.0	23.4	22,691	21,098	-	-	-
Czechoslovakia	2,530	2,410	-	-	-	27.9	25.8	70,547	62,079	-	-	-
Poland	14,197	14,430	-	-	-	17.9	18.3	254,382	263,787	-	-	-
Hungary	1,583	1,585	-	-	-	18.0	18.5	28,483	29,354	-	-	-
Yugoslavia	612	629	-	-	-	13.4	13.5	8,223	8,498	-	-	-
Rumania	941	1,076	-	-	-	14.6	15.9	13,725	17,136	-	-	-
Bulgaria	562	467	-	-	-	17.2	17.3	9,685	8,080	-	-	-
Greece	172	163	-	-	-	12.8	13.8	2,198	2,244	-	-	-
Lithuania	1,227	1,290	-	-	-	18.4	19.1	22,634	24,691	-	-	-
Latvia	625	693	-	-	-	19.8	21.6	12,395	14,944	-	-	-
Estonia	365	360	-	-	-	21.7	20.9	7,923	7,508	-	-	-
United Kingdom	31	19	128	120	108	21.6	18.2	671	345	3,840	3,520	(2,400)
Estimated total	41,400	41,200	38,000	37,000	33,500	-	-	906,000	897,000	817,000	745,000	610,000
Soviet Union	65,286	53,125	-	-	-	12.7	14.1	829,024 d/	750,173	-	-	-
Turkey	610	939	941	936	(1,076)	19.2	15.2	11,729	14,301	13,163	13,242	9,269
Argentina	936	894	1,984	1,379	-	10.5	10.9	9,873	9,771	21,936	7,456	(12,000)
Union of South Africa	114	117	215	-	-	7.4	6.8	838	794	925	954	-
Estimated world total	108,400	96,100	102,000	101,000	98,000	-	-	1,758,000	1,673,000	1,550,000	1,515,000	1,400,000

Compiled from official sources and the International Institute of Agriculture, where available; otherwise Office of Foreign Agricultural Relations estimates (shown in parentheses) based on foreign service reports and other information.

a/ Harvests of the Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow; thus, the crop harvested in the Northern Hemisphere in 1944 is combined with the Southern Hemisphere harvest which began late in 1944 and ended early in 1945. b/ Figures refer to harvested areas as far as possible. c/ Official estimates adjusted to include Alsace Lorraine. d/ Official estimates adjusted to take account of harvest losses.

The war and factors associated with the war have had a rather limited effect upon production until the 1945 season; whether or not the effects will carry over into succeeding seasons depends in large measure on recovery possibilities in eastern and central Europe. A tendency for farmers to underestimate plantings and yields, especially under war or occupied conditions, has been recognized, and the European total includes an allowance for probable underestimation in many countries--otherwise a still lower total would be indicated.

The Soviet Union is indicated to have planted a larger acreage and to have harvested a bigger crop than in 1944, though the outturns are still below the prewar average. A shift from wheat to rye, during the war years in the reoccupied areas, appears to have taken place, and this change noticeably affects the world rye total due to the importance of the Union as a rye producer. The total grain acreage seeded in the Soviet Union for 1945, according to some indications, was 80 to 85 percent of prewar, and of this total it may be reasonably expected that the breadgrains, wheat and rye, represent a higher proportion now than before the war. In addition to the estimate included for the Soviet Union, European areas that have been annexed, i.e. Bessarabia, northern Bukovina, Ruthenia, eastern Poland, the Baltic States, and parts of Finland, normally produced before the war around 80 million bushels of wheat and 140 million bushels of rye. The European totals would be correspondingly smaller and the Soviet Union larger, if the harvest figures for these areas were shifted. All estimates included, however, are on the basis of 1937 boundaries in order to facilitate comparisons.

For Africa, an increase over last year's short crop in Egypt is indicated, while a sharp decline is recorded in French North Africa. The latter area, normally an exporting region, harvested one of the smallest crops on record as a result of a severe drought--the worst reported in Morocco in 41 years and in Algeria since 1920. Instead of producing a surplus, North Africa has now become one of the largest importers in 1945-46. The total for Asia includes declines for China, Japan, and Turkey, but increases for India and other Middle East countries. Despite the increase for India, however, that country continues to be an active importer of wheat.

While it is still too early for any definite indications of the harvest in the Southern Hemisphere, estimates have been included on the basis of seeding reports and average yields. The 1944 outturns in Argentina and Australia were sharply reduced by drought so that around average yields would indicate significant gains from a year ago. In addition, a substantial increase in seedings is reported for Australia, from the very low levels reached during 1943 and 1944. The Southern Hemisphere crops will not be harvested until November-December, but as they represent a rather minor part of the world total, crop revisions and adjustments in other areas may have as much effect as subsequent changes in harvest results for this region. Argentina is the only important rye producing and exporting country in the Southern Hemisphere.

The outturn of the crop in that country, though small in the total, promises to have an unusually important effect upon world trade in rye this season, due to the limited supplies available in North America and the reduced European harvests outside the Soviet Union.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the OFAR Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, chairman, C. M. Purves, Gordon P. Boals, Judith E. Downey, Victor B. Sullam, and L. Volin.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

WAR REDUCES PHILIPPINE ISLANDS RICE ACREAGE

Due principally to deficiencies of work animals, seed, implements, and labor incurred as a result of the war, the 1945 rice acreage in the Philippine Islands, according to qualified observers, is believed to be about 60 percent of the prewar planted area. A tentative estimate for acreage in August was 3.1 million acres, as compared with 4.9 million acres during the 5-year average period ended with 1939-40. Another adverse factor affecting rice production on central Luzon was the delay of August planting, caused by lack of rainfall. On the Island of Luzon, where about 70 percent of the Philippine rice was produced before the war, the main crop is planted from June to August and is harvested from October to January.

PHILIPPINE ISLANDS: Rice production, trade, and utilization, averages 1930-31 to 1939-40, annual 1940-41 and 1945-46

Year	Acreage	Yield per acre	Production: Rough	Production: Milled	Net imports a/	Apparent utilization a/
	1,000 acres	Acres	Million bushels	Million pounds	Million pounds	Million pounds
Average -						
1930-31 to 1934-35	4,643	22.4	104	3,042	21	3,063
1935-36 to 1939-40	4,918	22.3	109	3,188	130	3,318
Annual -						
1940 -41	5,141	22.3	115	3,364	b/	b/
1945-46 c/	3,100	(22.3)	(70)	(2,000)	-	-

Compiled from official sources.
a/ Calendar year following harvest. b/ Not available. c/ Preliminary forecast. Production estimate based on average yield of 22.3 bushels per acre.

CUBAN GOVERNMENT REGULATES
RICE DISTRIBUTION

In an emergency measure designed to distribute equitably the present small rice supplies in Cuba, the Government on August 10 ordered that all rice imports must be reported to the Cuban Office of Price Regulation and Supply. When notification of arrivals is received, the ORPA issues permits which are necessary for clearance through customhouses. Under the new regulation, the ORPA expects to supervise closely the commercial distribution of rice in order to check speculative and black market tendencies during the critical period which will exist from now until at least late in September.

NICARAGUAN RICE CROP
PROSPECTS FAVORABLE

In Nicaragua a large rice crop is expected to be harvested from the 1945 planted acreage. The area was considerably larger than that of a year earlier, and favorable weather conditions so far have benefited growth. Despite prospects for a record crop, the retail price is now fluctuating from 12-1/4 to 16 cents per pound, the result of the current rice shortage. The small production last season not only prevented exports, but also caused a scarcity of rice in Nicaragua this year.

TOBACCO

CEYLON IMPORTS MORE
FOREIGN TOBACCO

Consumption of tobacco products in Ceylon is reported to have risen considerably during the war years, due to generally prosperous conditions. The domestic production of tobacco is nearly sufficient to meet the country's requirements, but increased quantities for foreign leaf, principally of the Virginia type, were imported during the war years for use in the manufacture of cigarettes.

During the immediate prewar period, Ceylon imported about 1.2 million pounds of leaf tobacco annually, of which about two-thirds originated in the United States. Practically all of the American tobacco imported was flue-cured. During the war years, 1941-1944, imports averaged 2.1 million pounds, but British India assumed first place as a supplier of the country's leaf-tobacco imports. Increased import duties became effective on July 2, 1945, and are at present $5.53 per pound on unmanufactured tobacco from other than Empire countries, and $4.62 on Empire tobacco. Imports of manufactured tobacco, with the exception of "beedies" from British India, are not significant.

Ceylon's tobacco acreage is estimated at from 13,000 to 14,000 acres annually, with yields under normal climatic conditions averaging about 1,000 pounds per acre. Two main types of tobacco are cultivated in Ceylon--Jaffna and Dumbara--neither of which are comparable with the

quality of imported leaf. Reports indicate that since 1941, experiments have been conducted in the growing of Virginia-type leaf, and the area planted to this type amounts to between 100 and 200 acres.

CEYLON: Imports of unmanufactured tobacco, by principal countries of origin, annual 1941-1944 and January-June, 1945

Country	1941	1942	1943	1944	Jan.-June 1945
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
British India	2,223	1,117	1,078	2,145	471
United States	433	182	584	763	406
Others	-	a/	a/	-	-
Total	2,656	1,299	1,662	2,908	877

Compiled from consular sources.
a/ Less than 500 pounds.

GREECE REMOVES
TOBACCO CONTROLS

Continued unsettled conditions in Greece resulted in the publishing of an emergency law on July 19, 1945, removing all restrictions on acreages, varieties of seed, and suitability of land for tobacco planting. Although the controls have been abolished, each tobacco grower, after termination of planting operations, has been required to file a declaration with the Tobacco Tax Commissioner indicating the acreage and variety planted and to report any subsequent changes. The declaration is in lieu of the license formerly required covering the area planted to tobacco. Recent information indicates that the provisions of a law promulgated in 1938, requiring growers to sort their leaf tobacco into certain categories at the time of packing, may also be suspended.

COTTON AND OTHER FIBERS

BELGIAN FIBER PRODUCTION
INCREASES

The 1945 flax and hemp acreage planted in Belguim shows a marked increase, according to official estimates. Nearly 60,000 acres are planted to flax this year, as compared with about 26,000 in 1944, and an average of about 35,000 during the 5 years, 1930-1934. The crop harvested this year may turn out approximately 83 million pounds of fiber and tow. Although the hemp acreage for 1945 is reported at about 220 acres or about 41 percent greater than the 156 acres planted in 1944, it is only about 17 percent greater than in 1943.

Annual acreage increases since the exceptionally small flax plantings of less than 21,000 acres in 1934 brought the total up to more than 100,000

acres a year during 1939 and 1940. A considerable decrease occurred in 1941. The average acreage during the first 3 years of German occupation remained about equal to the prewar average. Hemp plantings after World War I averaged several hundred acres per year, but decreased to only about 58 acres annually during the 10 years, 1926-1935. Recent wartime acreages probably averaged at least double the peacetime average.

The quality of Belgian flax is exceptionally good. More than 10 percent of the crop normally is consumed within the country, and the remainder is shipped to neighboring countries. Large quantities of flax straw are also brought in from France and the Netherlands for processing in Belgium. Some of this imported raw material is reexported as cleaned raw fiber, but much of it is manufactured into yarns, threads, and fabrics before it is shipped out.

WEEKLY COTTON PRICES ON FOREIGN MARKETS

The following table shows certain cotton price quotations on foreign markets, converted at current rates of exchange.

COTTON: Price of certain foreign growths and qualities in specified markets

Market location, kind and quality	Date 1945	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria (spot)		Kantar			
Ashmouni, F. G. F.	8-23	99.05 lbs.	Tallaris	35.25	29.38
Giza 7, F.G.F.	8-23	99.05 lbs.	Tallaris	Not quoted	
Karnak, F.G.F.	8-23	99.05 lbs.	Tallaris	39.00	32.51
Bombay (Sept '45 futures)		Candy			
Jarila	8-22	784 lb.s	Rupee	362.00	13.91
Bombay (spot)		Candy			
Kampala, East African	8-22	784 lbs.	Rupee	850.00	32.66
Buenos Aires (spot)		Metric ton			
Type B	8-25	2204.6 lbs.	Peso	1300.00	17.56
Lima (spot)		Sp. Quintal			
Tanguis, Type 5	8-25	101.4 lbs.	Sol	106.00	16.08
Recife (spot)		Arroba			
Mata, Type 5	8-24	33.07 lbs.	Cruzeiro	86.00	14.16
Sertao, Type 5	8-24	33.07 lbs.	Cruzeiro	83.00	13.66
Sao Paulo (spot)		Arroba			
Sao Paulo, Type 5	8-24	33.07 lbs.	Cruzeiro	88.50	14.57
Torreon (spot)		Sp. Quintal			
Middling, 15/16"	8-25	101.4 lbs.	Peso	87.75	17.81

Compiled from weekly cables from representatives abroad.

FRUITS, VEGETABLES, AND NUTS

SAN JOSE SCALE REPORTED IN FRANCE

San Jose scale is now indicated to be firmly established in France, and possibilities for its early eradication are uncertain, late field surveys disclose. Unless France can demonstrate effective domestic control, enforcement of rigid restrictions on fruit imports, maintained before World War II, will be difficult. Since May 1932, the French Government has carried on rigid inspection of American fruits, principally of apples and pears, arriving for consumption in France. Fumigation plants were established, and by 1934 an inspection system was well under way. By 1937, the presence of a single small scale was sufficient to cause the fumigation of an entire carload. From the standpoint of the quantity of fruit called "rejections," the 1938-39 season was the heaviest, with 21 percent of American apples arriving in French ports passing through the fumigation chambers. This process made fruit more expensive. In the United States a staff of inspectors was maintained, principally on the Pacific Coast, to assure only clean fruit coming from packing houses.

There were rumors in 1930 of San Jose scale in France, as it existed in other countires, and indications were that the insect would have been introduced on nursery stock. Information is now available that officials of the Ministry of Agriculture identified San Jose scale during 1935. This information was published in 1942.

At that time, there were 3 centers of infestation: Alpes-Maritimes, Vaucluse, and the Rhone Valley near Lyon. The center of infestation in the Alpes-Maritimes Department was in orchards containing 300,000 closely planted trees, mostly peach. In Vaucluse the infestation covered only 5,000 trees. Around Lyon this scale was discovered first in nurseries about 1935 or 1936. Sale of stock out of these nurseries soon established many small centers of infestation. Lack of control during German occupation has completely removed hope of eradicating San Jose scale, and the best that can be anticipated during the next few years is retardation of its spread.

CANADIAN FORAGE SEED PROSPECTS VARY

Prospects for alfalfa seed production in Canada in the Interlake area of Manitoba are good, but in the territory extending from Hudson Bay Junction to Meadow Lake in Saskatchewan, an important alfalfa area for registered seed, conditions are only fair. Prospects are good in, southern Alberta, in the Brooks district, but conditions are reported as poor in northern Alberta, adjacent to Edmonston.

The alsike clover seed crop north of Edmonston probably will be only 25 percent of last year's crop, but a fair crop may be harvested in the

Peace River country. The outlook for the rapeseed crop mostly in Moose Jaw, Saskatchewan, is spotty. Prospects for bromegrass and crested wheatgrass in southern Manitoba are good, but the yield may be only 60 percent of last year's crop in the brome area adjacent to Saskatchewan. Sweet clover is only fair in Manitoba, weevils having done considerable damage, and much acreage has been ploughed under. In north central Saskatchewan prospects are good. Production for Canada as a whole may be about the same as last year. Stocks of forage crop seeds held by seed dealers on July 1, 1945, totaled 8,391,000 pounds, 12 percent below the 9,589,000 pounds in 1944.

CANADA: Stocks of forage seeds, July 1, 1945, compared with same date in 1943 and 1944

Forage Seeds	1943	1944	1945
	1,000 pounds	1,000 pounds	1,000 pounds
Alfalfa	200	507	780
Clovers			
Alsike (including Alsike and White)	124	843	350
Red (all types)	110	875	1,009
Sweet	1,390	932	1,438
Grasses			
Timothy	3,684	4,881	2,959
Bromegrass	778	669	814
Crested wheatgrass	248	464	586
Slender wheatgrass	a/	189	236
Canada bluegrass	68	102	74
Kentucky bluegrass	a/	90	100
Bentgrass	a/	15	7
Creeping Red Fescue	a/	15	10
Meadow Fescue	a/	5.3	14
Orchardgrass	a/	2.2	14

Compiled from official sources.
a/ Not included in previous surveys.

CANARY ISLANDS TOMATO
OUTLOOK PROMISING

The outlook for tomato production in the Canary Islands in the 1945-46 season is considered good. The United Kingdom is expected to import tomatoes from the Canaries, by means of Spanish vessels, and present hopes are that the United States Army may resume purchases. Production for the 1944-45 season is estimated at 1,465,000 bushels of 53 pounds, 17 percent above the estimated production of 1,248,000 bushels in the preceding season. During the past season, 1,450,000 bushels were exported, of this amount 109,000 bushels were supplied to the United States Army, while the remainder was shipped to the Spanish Peninsula.

LIVESTOCK AND ANIMAL PRODUCTS

BRITAIN FORMS JOINT ORGANIZATION TO MARKET WARTIME WOOL SURPLUS

A joint organization representing the Governments of the United Kingdom, Australia, New Zealand, and South Africa is to be formed to supervise the disposal of wartime stocks of wool of these Dominions, accumulated by the United Kingdom, according to an announcement of the British Wool Control.

At the beginning of the war, the United Kingdom arranged to purchase the clips of Australia and New Zealand for the duration of the war and for 1 year thereafter. In 1940-41, this agreement was extended to the clip of the Union of South Africa. The aggregate supplies remaining in stock from these purchases amounted to more than 3 billion pounds as of June 30, 1945, or the equivalent of more than 2 years' production in the Dominions.

The three Dominions will now join the United Kingdom in ownership of the stock, will share in storage and marketing expenses and also in ultimate profit or loss resulting from final clearance. The joint organization is expected to include auctions of wool stocks in its sales program in order to increase disposal. As soon as conditions permit, current clips also will be offered at auction, as before the war. Minimum reserve prices will be established for all wool, and any new wool not purchased at or above these prices will be taken up by the joint organization.

DANISH-POLISH TRADE AGREEMENT INCLUDES LIVESTOCK AND ANIMAL PRODUCTS

Under the terms of a Danish-Polish Trade Agreement, effective from September 1 to April 30, 1946, signed in Warsaw recently, Denmark has agreed to ship butter, bacon, horses, and cattle to Poland. Other miscellaneous livestock items such as seeds, fish, and machinery are also to be shipped. In exchange, coke and coal are the principal items to be supplied by Poland.

Cattle and horses, numbers or which have been well maintained in Denmark, are especially needed in Poland to rehabilitate agriculture. The number of work or breeding animals that will be included in the shipments to Poland, however, is not known. As Denmark now has a surplus of 200,000 head of marketable beef cattle above domestic needs, some shipments are likely to include beef or slaughter animals.